

# TECHNIQUES FOR BUILDING CLIENT LOYALTY

By Robert N. Kohn and Jeffrey Müller

Loyal clients are your most important asset. Loyal clients give you more work. They introduce you to their contacts. They go to bat for you in the event of a problem. They fight for retaining your services in the event of a client take-over. And, they bring you with them as they grow or move in their careers.

However, there are many obstacles to building client loyalty. One obstacle is the concern that activities designed to increase loyalty could be perceived as an insincere and self-serving effort to gain more work. One lawyer we know made the following comment: "My clients don't want to be taken to lunch, or ball games. They just want me to do the work. And, anything else beyond that is perceived by them as a transparent sales effort which they resent."

This lawyer was expressing two sentiments which are common among lawyers. The first sentiment is the belief that "Doing good work," is the only appropriate method for marketing to clients. The problem with this belief is that there are thousands of lawyers across the country who do good work. And, while we agree that good work is necessary to build client loyalty, it is imperative to find strategies for differentiating yourself from the competition. Otherwise, you have no real financial security in your practice. Unless you practice in a highly specialized area of the law, your legal services are fungible.

The second sentiment being expressed is that selling is distasteful and inappropriate. For many lawyers, selling feels pushy, manipulative and greedy. It can lead to feelings of rejection and embarrassment. And, it may offend some clients, ruining those relationships.

While it is true that there are salespeople who use inappropriate tactics, the fact is that selling is not, in-and-of-itself, inappropriate. Your goal in building client loyalty is to

identify selling techniques that are honorable and appropriate for you.

There is a fundamental strategy that we teach for building client loyalty that is both honorable and appropriate. The strategy is to reveal your positive personal qualities. We believe that people do business with the people they know and like. As clients learn more about your positive personal qualities, they develop a greater feeling of pride, comfort and loyalty in working with you.

## List the personal qualities you want to reveal

The first step in revealing your personal qualities is to write them down. In our client relations workshops, we have lawyers write down the personal qualities they are proud of. Here is a sample of personal qualities they have identified:

- Knowledgeable
- Experienced
- Creative
- Loyal
- Trustworthy
- Empathic
- Organized

Once you know what your qualities are, you are ready to develop some techniques for communicating them to your clients.

## Give Added Value

One honorable and appropriate technique for revealing many of your personal qualities is to give added value. Here are three categories of added value.

## Education

One of the most effective techniques for building client loyalty is education. Some  
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forms of education include public speaking, teaching and seminars. Clients appreciate it when you invite them to seminars. They also appreciate you going to their sites to do seminars for their employees.

Another form of education is writing articles. We recommend that you write articles which give tips on how your clients can improve their businesses. You can then get your articles published and send them to your clients. In educating your clients, you not only provide useful information, but you reveal important qualities about yourself such as knowledge and experience.

### Entertainment

One of the easiest and most common techniques for building relationships is to take your clients to lunch. If they don't want to go to lunch, as was mentioned in the earlier example, try to find something else they would enjoy. Engage them in conversation and listen for opportunities. For example, if in the course of conversation they say they just got back from a vacation, find out where they went and what they did. You might find out that you share similar interests. Even if you don't share interests, they might mention something that you would like to try.

Or, you could invite clients to participate in activities that you enjoy. One of our clients takes his family and his clients' families to the circus. Another lawyer we know invites her clients to musical soirees in her home. Another one of our clients regularly throws theme parties. Entertaining is fun and it can reveal qualities you may have such as creativity and depth of character.

### Volunteer Work

Another category of value is volunteer work. Many lawyers get involved in their communities or in charities. It is a way of helping others, and at the same time building relationships. The first step in doing volunteer work is to find the right cause. One technique is to ask your clients what charities or organizations they support. Clients are often happy to discuss their causes.

After doing some research, pick something that you care about. Most people find it extremely rewarding to contribute their time to a good cause. And, when you do volunteer work, it is an opportunity to reveal qualities about yourself such as compassion or generosity.

### Describe Your Rules and Procedures

In addition to added value, you can reveal personal qualities through dialogue. One form of dialogue is to describe the rules and procedures that guide your practice. For example, in our company we like to remind our clients that we are proud of always being on time. When we have a telephone appointment, our rule is to begin dialing 20 seconds before the appointed time. Furthermore, we use clocks that automatically reset themselves every day to the atomic clock in Boulder, Colorado. By explaining this rule to clients, it makes the point that we value accuracy and precision, and that we respect other peoples' time.

### Use War Stories

Another technique for describing personal qualities is to tell war stories. When clients bring up a matter, instead of simply discussing your legal strategy, you could describe in depth similar experiences you've had in the past. You could reveal how passionate you are about the issue, or how tenacious you are in solving problems.

### Describe Qualities in Other People

One of the biggest obstacles in discussing your personal qualities is that it can feel like bragging. Or, it feels foolish to say something like, "I'm empathic." But it is absolutely appropriate to talk about the qualities that you admire in your partners. You could say, "One of the things I admire about my partner is how empathic he is." When you discuss qualities that you admire in your partners, people often make the assumption that you possess the same qualities.

Building loyalty doesn't require that you behave like an obnoxious, pushy salesperson. But rather, it means learning how to express the qualities that you possess which make you a unique and valuable person. The more your clients come to learn about your personal qualities, the more they will feel a sense of loyalty and pride in working with you.

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### QUESTIONS: CLIENT LOYALTY

1. Strategies for building client loyalty should always be honorable and appropriate.

True False

2. In building client loyalty, you run the risk of being perceived as manipulative and pushy.

True False

3. The example in the article illustrates a common sentiment among lawyers that good work alone does not build client loyalty.

True False

4. It is unethical and inappropriate for lawyers to sell to their clients.

True False

5. Unless your practice is highly specialized, your legal services are fungible.

True False

6. The authors recommend that you avoid discussing personal interests with clients, unless they bring it up.

True False

7. It is a good idea to discuss the personal qualities that you are proud of.

True False

8. One honorable and appropriate technique for building client loyalty is education.

True False

9. Authoring articles can reveal personal qualities.

True False

10. Contrary to common belief, clients usually don't appreciate invitations to seminars.

True False

11. When clients say that they don't want you to take them to lunch, it is probably not a good idea to risk the relationship by

offering other forms of entertainment.

True False

12. According to the authors, sharing interests with clients is a type of added value.

True False

13. When thinking of strategies for entertaining clients, a good rule of thumb is to "Always play it safe."

True False

14. Doing volunteer work is an appropriate and honorable way of building relationships.

True False

15. One of the obstacles to building client loyalty is that clients often feel uncomfortable discussing their charitable causes with their lawyers.

True False

16. One highly effective technique for revealing personal qualities is to describe your rules and procedures.

True False

17. According to the article, sharing war stories is an effective technique for building client loyalty, especially when you have clients who served in the military.

True False

18. Describing your past experiences is a way of revealing that you are passionate about practicing law.

True False

19. Statements such as, "I am trustworthy," or "I am smart," always impress clients.

True False

20. It is honorable and appropriate to describe the qualities you admire in other people.

True False

